



# Client onboarding checklist

CLIENT:

CLIENT ONBOARDING SPECIALIST:

1.	Send a welcome email	<input type="checkbox"/>
2.	Do background research on the client	<input type="checkbox"/>
3.	Conduct the first onboarding meeting	<input type="checkbox"/>
4.	Send the client a welcome packet	<input type="checkbox"/>
5.	Collect relevant documentation (e.g., contracts)	<input type="checkbox"/>
6.	Collect client's personal info (e.g., send a questionnaire)	<input type="checkbox"/>
7.	Present the product/service (tutorial, live/ virtual demonstration, etc.)	<input type="checkbox"/>
8.	Set up a project management tool for managing the onboarding process	<input type="checkbox"/>
9.	Set up communication channel(s)	<input type="checkbox"/>
10.	Create short-term milestones	<input type="checkbox"/>
11.	Create long-term milestones	<input type="checkbox"/>
12.	Celebrate milestones	<input type="checkbox"/>
13.	Schedule a weekly check-in with the client	<input type="checkbox"/>
14.	Schedule a monthly check-in with the client	<input type="checkbox"/>
15.	Schedule a quarterly or a 6-month check-in with the client	<input type="checkbox"/>
16.	Send the client a goodbye packet	<input type="checkbox"/>

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